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ABSTRACT

This paper examines the historical development and current structure of transfer mechanisms within British Columbia (Canada), as reflected in a selection of reports, research studies, policy documents, and conversations with post-secondary education specialists in the province. It reviews the growth of the higher education system in British Columbia since the early 1960s. In tracing the trajectory of educational expansion, consolidation, and revision, this report demonstrates how transfer policies and practices have evolved. Clearly, the recommendations set forth in the MacDonald Report in 1962 were so instrumental in shaping the higher education system that they have had significant implications for transfer effectiveness and for the kinds of transfer-related problems with which students and institutions have had to deal. In particular, the MacDonald report's recommendation that universities and colleges function as autonomously as possible has meant that the need for significant and ongoing effort in ensuring co-ordination and articulation among the many institutions within the system has been considerable. However, a number of persistent problems remain. Many committees associated with the issue of transfer, and existing policies and practices, have focused on honing and refining--rather than completely overhauling and rebuilding--the system. The paper also features an annotated review of materials on transfer research and policy in British Columbia. (Contains 42 references.) (VWC)

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Introduction

This report is part of a larger study entitled "Investigating Transfer." By focussing on policy issues related to transfer, this paper is intended to complement the review of the literature entitled *Today's Higher Education Students: Issues of Admission, Retention, Transfer, and Attrition in Relation to Changing Student Demographics* (Andres & Carpenter, 1997) and two studies of students' transfer experiences (Andres, Qayyum, & Dawson, 1997; Andres, 1998).

British Columbia has one of the most sophisticated sets of transfer arrangements in Canada. The province's universities and colleges have maintained an admirable record of co-operation in addressing transfer and articulation issues. The provision of programs for university transfer has been a major function of public post-secondary institutions in the province since the inception of community colleges in the mid 1960s. However, transfer difficulties, either perceived or real, continue to be reported in research studies or anecdotally. A large body of research exists to inform policy and practice related to transfer, yet students' experience of the transfer process has been neglected. Many questions about the strengths and weaknesses of transfer mechanisms for the students who undertake to transfer from one institution to another remain unanswered. To explore these questions, the main focus of the *Investigating Transfer Project* is an in-depth case study of students' experience of the transfer process, involving students at two Lower Mainland institutions – one community college and one university – with potentially strong transfer links. In order to establish the background and context for the central case study, the purpose of this report is to examine the historical development and current structure of transfer mechanisms within British Columbia, as reflected in a selection of reports, research studies, policy documents, and conversations with post-secondary education specialists in the province.

Historical development of transfer mechanisms

The major catalyst in the development of the current higher education system in British Columbia was the Macdonald Report, published in 1962. The Report, titled *Higher Education in*

British Columbia, was written by the President of the University of British Columbia, John Macdonald, and has been referred to as the "outstanding single document on Higher Education in British Columbia" (Ministry of Education, Science, & Technology, 1979, p.7). Following from the publication of this document, a whole new system of higher education was launched. The Macdonald Report has had a tremendous impact on the growth and distinctiveness of the higher education community in British Columbia, with significant implications for the character of transfer processes, policies and problems.

The Macdonald Report was written at a time when the future looked limitless and education was viewed as "the major key to the progress of mankind" (Macdonald, 1962, p.4). Forecasters were predicting explosive growth in student populations everywhere on the continent (Macdonald, 1962; Jeffels, 1972). Macdonald was faced with the real concern that unless serious measures were taken to bring about major expansion and extension of its aims, the existing higher education system would be overtaxed and unable to meet the demands of the future.

In Macdonald's recommendations, there were two requirements for the achievement of excellence in the expanded and extended higher education system he proposed. The first requirement was **diversification** of both the *kinds* of educational opportunities available, as well as the *places* where education could be obtained. With regard to the former, to meet the needs of a rapidly changing society and workforce, many kinds of alternate educational programs beyond the traditional offerings of the university were required. With regard to the latter, it was recommended that educational opportunities be extended into the hinterlands so that those unable to relocate to the urban centres in order to pursue post-secondary studies would have the opportunity to do so. The second requirement was the **self-government** or autonomy of educational institutions, allowing each institution to be responsive to the needs of the local community, and to have the independence to define its own goals and organize its own programs and procedures. He cited a study undertaken in Michigan to support the view that "the strength of an institution is closely associated with autonomy in the making of essential decisions affecting the institution's operations. It is virtually impossible to build a strong institution of higher education unless it is given the maximum of self-determination in its operations" (Macdonald, 1962, p.22, citing Russell, 1958, p.111). Underlying these two requirements was a vision of education as a key player in a democratizing strategy that would level the playing field, and provide "new avenues of opportunity for the previously

disenfranchised" (Dennison & Gallagher, 1986, p.162).

With these broad interests in mind, the specific recommendations made in the Macdonald Report involved the establishment of two new four-year colleges in major urban centres, and the creation of a number of two-year community colleges in various regions throughout the province, supported by the local school districts in those areas. The mandate of the four-year colleges would be to continue to provide degrees in the liberal arts, the sciences, the professions, and post-graduate studies. The objectives of the community colleges would include one or more of the following:

> (a) two-year academic programmes for students who will either transfer to degree-granting institutions or will complete their formal education at this level; (b) technological and semi-professional courses designed for students who want formal education beyond high school but who do no plan to complete the requirements for a degree; adult education, including re-education to meet the changing demands of technical and semi-professional occupations (Macdonald, 1962, p.51).

With regard to the implications for students wanting to transfer from one institution to another in such a diversified and autonomous system, Macdonald claimed that while independence was to be prized, there needed to be some sense of *parallel* between institutions and programs, without having parallel mean *identical*. In a footnote, he stated:

> Transfer should be possible between institutions but it should be based not on identity of courses but on performance of students. Admission policies should be concerned less with prerequisites and more with evidence of ability when students seek transfer from one institution to another. (p.23)

However, he provided very little commentary in the Report regarding the means by which the mechanisms and criteria of transfer ought to be managed. The primary recommendation concerning transfer in the Macdonald Report was for the establishment of an Academic Board, to include representation from both colleges and universities, which would be responsible for ensuring the maintenance of exemplary standards system-wide, and facilitating transfer arrangements among the various institutions. The role of the Board would not be to dictate but to offer guidance and advice. "Through such a Board, the transfer of students from one institution to another could be facilitated" (Macdonald, 1962, p.78).

The Macdonald Report was received enthusiastically at a time when there was widespread political and public will in support of both his vision of the role of education in creating a brave, more democratic future, and his specific recommendations. The Report was tabled in the Legislature

in January 1963 (Ministry of Education, Science, and Technology, 1979), and the necessary enabling legislation, through amendments to the Public School Act and a new Universities Act, was put in place. A period of unprecedented expansion followed. In less than ten years two new universities (Simon Fraser University, built from "scratch," and the University of Victoria, an outgrowth of what was once Victoria College) had been created. Moreover, "rather than the seven colleges recommended by Macdonald there were nine, and by 1975, fourteen" (Ministry of Education, Science and Technology, 1979). Macdonald's recommendations for diversification and autonomy were also taken seriously. The colleges were relatively independent of the universities, and as one report put it, "objected to universities scrutinizing the qualifications of their faculty, dictating curriculum content, or doing anything else that would make them feel subservient to a university" (Ministry of Advanced Education and Job Training, 1987, p.2).

Despite these concerted efforts towards implementation of Macdonald's recommendations, as in most instances of translating ideas into reality, plans did not unfold entirely as expected. There were two key factors that intervened between Macdonald's grand plan and the resulting system that was put in place, with one by-product, among many, being that the establishment of successful transfer arrangements faced some unexpected bumps and hurdles that needed to be negotiated.

The first intervening factor was the insufficiency of enabling resources. Although serious commitments of effort and money were directed towards building the expanded, extended higher education system Macdonald envisioned, there was still a significant shortfall between the resources available and those needed to achieve the best results possible. Financing was a contentious issue, the administrative details to be worked out with very little lead-time, were intricate and vast, and the administrative bodies created to assist in coordinating the system were not in keeping with the initial recommendations (Jeffels, 1972). With regard to transfer, in particular, the Academic Board Macdonald recommended to facilitate communication between institutions was denied the kind of scope that would have allowed it to function with full effectiveness, especially in carrying out formal and continuing liaison and articulation between elements in the system. In a discussion of issues involved in transfer credit a decade after the publication of the Macdonald Report, Jeffels (1972) points to the existence of curriculum committees[1] sponsored by the Academic Board, centred

[1] The curriculum committees to which Jeffels refers were actually articulation committees. According to Jeffels (1972), these committees endeavoured to resolve transfer problems by "meet[ing] at frequent intervals throughout

on individual disciplines, meeting at frequent intervals throughout the year to discuss parallel offerings, as the key medium for easing problems in transfer from one institution to another. He states that whereas on the whole there was relative ease of transfer between the college and university sectors, the three universities differed in their policies and techniques about reaching agreement over transfer credit, and that complications could arise when negotiations about transfer credit did not go through proper channels of communication. In recommending greater efforts at coordination and integration, Jeffels suggested the creation of a central agency to foster more opportunities for liaison, the publication of a bulletin at regular intervals, ensuring that the officers responsible for administering the system of transfer credit and printing transfer guides would be kept up to date, and the consideration of the possibility of transferring a number of units of credit *en bloc*, as opposed to course by course.

The second factor was not a matter of insufficiency of resources or outcomes, but of the social and political stresses of the day. For one thing, the mood in the early 60s of optimistic and unproblematic social progress through educational change had given way, by the end of the decade, to a period of active and volatile student unrest, accompanied, in the early 70s, by a sense of impending economic crisis and prevailing social unease which persists to this day. Universities in particular came under pressure from within and without, to adapt to the times. As Jeffels (1972) wrote, from the vantage point of the early 70s,

> universities are, everywhere, under severe criticism. They seem ultra-conservative, slow to change, reluctant to experiment. They continue to teach rigidly divided fields of learning; and they appear to respond but slowly to violent, tumbling changes in a highly complex, mobile, ebullient, restive society. (p.5).

Colleges, with their greater tendency towards experimentation and closer association with the communities, and their relative lack of "preconceived notions about what an institution of higher learning should be" (p.6), faced equal challenges but with less outright criticism from students and communities. The greatest threat to the colleges came, from the outset, from within the higher education community itself, in the form of suspicions regarding whether or not the education provided at the college level could "live up to" university expectations and standards. Even the Macdonald Report, despite the ideal of diversified and equal educational opportunities it put forward, set the university up as the arbiter of the necessary standards to which colleges were

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the year to discuss, in principle and detail, the offerings to be given at colleges and universities in specific fields of

required to accommodate themselves and attain. As the new kid on the institutional block, colleges had to struggle to identify themselves as separate from but equal to universities, and faced a persistent bias that they provided a second-rate education – that they would be perceived as providing potential "havens for second class citizens whose academic achievements were insufficient to allow them entrance to the universities" (Dennison & Jones, 1970b). According to one observer, this was exacerbated by an element of professional resentment of the colleges' very success in attracting growing numbers of students and qualified staff and in not being subject to the same extremes of antagonism faced by universities. Jeffels (1972) concurred:

> because, on the whole, the colleges have been successful, very often under trying physical conditions and with rather lean budgets, there is a growing unease and malaise among some members of university faculties about that success. In candid terms, if student enrolments remain static, or if they decline absolutely, unhealthy competition and rivalry may grow between institutions within the system. (p.6).—

Of course, there were significant implications for transfer in all of this. Universities, after all, were predominantly the institutions transferred *to*; accordingly, they were ultimately in the position to accept or reject whether or not college offerings provided the necessary equivalencies, and the necessary academic rigour, to accommodate transfer arrangements. Despite the mandate for autonomy and self-government recommended by Macdonald, standards and practices could not be entirely internal to the college, because they were perforce determined to some extent by the parameters dictated by the accepting university.

One reflection of the struggle of the colleges to establish their legitimacy within the higher education system is that, from the early days of college expansion – and perhaps in response to Macdonald's view that transfer should be based on student performance rather than specific course equivalencies – the level of performance of students who transferred from college to university was subject to intense scrutiny (Dennison & Jones, 1968; Dennison & Jones; 1970a; Dennison & Jones, 1970b; Dennison & Jones, 1971; B.C. Research, 1972; Dennison, Jones & Tunner, 1974; Dennison, Forrester *et al.*, 1974; Jones, 1975; Jones & Dennison, 1977a; Jones & Dennison, 1977b; Jones & Dennison, 1977c; Dennison, 1977; Jones, Forrester, & Dennison, 1979; Dennison, Jones & Forrester, 1979; Forrester, Jones & Dennison, 1980). Some of these studies did, in fact, indicate that college students achieved slightly lower grade point averages, and slightly higher drop-out and

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learning" (p.11).

attrition averages than students who began their studies at university directly. It is noteworthy that although one of the early studies (Dennison & Jones, 1970b) indicated that some students had encountered problems in the transfer process – for example, loss of credit due to having taken more courses than allowed, wrong courses taken at college, and incorrect course sequences – the focus of subsequent studies remained fixed on the measurable performance of students, rather than on the performance of institutions in providing optimum conditions to facilitate successful transfer, or on the experience, successful or otherwise, of students undertaking the transfer process.

Perhaps as a result of the problems alluded to by Dennison and Jones (1970b) and the suggestions put forward by Jeffels (1972) to improve the existing mechanisms for communication and liaison between institutions as they pertained to successful transfer credit arrangements, a number of organizational adjustments were made in the mid- 1970s which resulted in the establishment, for the first time, of a central co-ordinating body overseeing transfer practices, and the publication of a formal set of transfer policy guidelines. Previously existing administrative bodies were reorganized and the Universities Council and the Academic Council were created. The mandate of the latter included responsibility for coordination and funding of academic programs offered by the colleges, and depended upon "articulation committees to provide advice on the equivalency of courses given at one institution compared with another" (Ministry of Education, Science & Technology, 1979). In 1976 and 1977, the British Columbia Post-Secondary Co-ordinating Committee (BCPSCC) formulated the first British Columbia Transfer Credit policy, which consisted of a set of principles and guidelines for transfer ratified by individual university senates and college councils.

These principles and guidelines laid out some general ground rules for transfer arrangements system wide, although the decisions about specific course equivalencies remained within the purview of individual institutions, to be negotiated and established through the Articulation Committees representing specific discipline areas. The Transfer Credit Policy set forth such fundamental concerns as the need for an atmosphere of mutual respect, full and free exchange of information, and recognition of the Articulation Committees as the central organs of discussion regarding transfer arrangements and concerns. The guidelines also spelled out practical considerations regarding the kind of information to be shared, the importance of keeping each other informed, the importance of recording and recognizing arrangements, the need to fulfil course

descriptions, and the requirement to state reasons for any instances of refusal of transfer credit. Although there was nothing in the Transfer Credit Policy that drew attention to the background of concern regarding possible university bias against college standards, it did establish a horizon of accountability, openness, and fair play in making decisions about transfer which all institutions within the higher education system were expected to endorse and respect.

Despite these efforts to ensure that the transfer process worked effectively, there were still reports that, despite the relatively high degree of integration attained within such a heterogeneous system, transfer problems persisted, associated with ongoing concerns that the democratizing project of higher education was not achieving the desired effects. In a report to the Universities Council addressing the issue of accessibility to post-secondary education prepared by the Ad Hoc Committee on Accessibility, although transfer was not a central issue it was mentioned as one among many areas in which problems of accessibility persisted. The report took issue with the growing emphasis on education as an instrument of economic growth rather than intellectual enlightenment (Universities Council of British Columbia, 1977; Dennison, 1977), and indeed challenged the very notion, at the heart of educational expansion, that educational reform could somehow create greater social equality through modest mechanisms for "removing barriers" and "opening doors" (Universities Council of British Columbia, 1977, p.4). The major barrier to accessibility identified in the report was the

> fact and perception that the institutions to which people wanted access were established and run by somebody else, somewhere else, in the interests of others. . . . [A] major barrier to accessibility in all parts of the Province is a perception based in reality, that public institutions of learning and training do not belong to them and are not intended for them to use. (p.4).

Transfer problems were identified as a component of this situation. "Access to some programs through transfer from the local community college is a real problem. Articulation and transfer problems are real and appear not to be improving" (Universities Council of British Columbia, 1977, Appendix IV, p.4). The report cited the necessity of college students to plan their programs on the basis of different requirements of each university, and the necessity of colleges to plan and justify their courses in light of what each university accepted as meriting transfer credit. The report echoed earlier assertions that the consequences for transfer of the principle of institutional self-government endorsed by the Macdonald Report resulted in difficulties on the part of the colleges – in particular college students – in dealing with different expectations among the three universities, and less room

for autonomy at the college level, in having to gear their programs to university criteria.

A decade after the publication of the *Ad Hoc Committee on Accessibility* report, the same concerns and preoccupations were still evident in the higher education system. For one thing, access was still a by-word for identifying and attempting to resolve persistent inequities in the educational system. For another, the Committee's critique of the growing vocational emphasis in higher education had no impact against the changing times. In the prevailing philosophy of the late 80s, even greater attention was paid to orienting educational opportunities to economic and workforce needs. As a reflection of these two motifs within the educational policy debate, a series of papers under the umbrella title *Access, Completion and Transition to Work* was published by the Ministry of Advanced Education and Job Training addressing a number of issues pertaining to these themes. One paper, titled "Transfer policies and mechanics" dealt specifically with transfer concerns. This paper states that although on the whole transfer from academic programs at colleges to universities was working effectively and that "the coordinating and articulating mechanisms are working well and are considered essential" (Ministry of Advanced Education and Job Training, 1987a, p.1), some irritations existed and greater efforts at improving communication between and among institutions and by institutions were called for. Three significant issues were identified in this report: first, the demands for transfer from college to university for students in career programs, rather than direct academic transfer programs, was sufficient to warrant attention and improvement; second, international students could be better accommodated; and third, transfer students were sometimes perceived to not have the same opportunities for university admission as those who began their studies at university directly. The third concern in particular reflected the same kinds of tensions between colleges and universities regarding the relative status and advantages of college and university study that have been identified earlier. The principal recommendation arising from this report was for the establishment, above and beyond the continuing role of the Post-Secondary Articulation Co-ordinating Committee, of some form of "ongoing mechanism for vetting and resolving these major issues which come up very occasionally" (Ministry of Advanced Education and Job Training, 1987a, p.10). The notion of block transfer, originally proposed by Jeffels (1972) some 15 years earlier was also mentioned as a possible consideration where transfer could be negotiated by program rather than on a course by course basis, which remained the standard practice of determining transfer credit arrangements.

In a subsequent report, published one year later, again addressing concerns of access and transition to work, "admissions, transfer and articulation" was included as one of five priority concerns, along with: institutional capacity and program quality; literacy and adult basic education; university degree programs outside the Lower Mainland and south Vancouver Island; and under-represented groups. Although again noting that the present system of articulation committees appeared to be working reasonably well, the recommendation to establish an ongoing mechanism or agency to oversee transfer and articulation arrangements was again put forward as follows:

> it is recommended that a Co-ordinating Council on Admissions, Transfer and Articulation with representatives chosen from names submitted from within the system, be established to provide a mechanism for the resolution of difficulties which may arise from time to time with respect to admissions, course and program equivalency, degree requirements and transfer of course credits. (Report of the Provincial Access Committee, 1988, p.iv)

In 1989, in response to this recommendation, the British Columbia Council on Admissions and Transfer (BCCAT) was established as a major Government initiative intended to improve access to post-secondary education. The broad mandate of the Council was to provide leadership and direction in ensuring that the various post-secondary institutions worked together as an integrated and co-ordinated system. Implementation of this recommendation, along with several others contained in the *Access for All* report, would dramatically change the face of the post-secondary system in B.C.

One of the first initiatives taken by the Council was to review and revise the 1976/77 Transfer Credit Policy and to engage in the process of once again having it vetted by the relevant post-secondary institutions within (and to a limited extent outside) the province. A new set of statements governing transfer relationships was formulated, similar in most essential respects to the original guidelines, yet revealing some changes in emphasis and direction. The new principles added the objectives of increased accessibility, and protection and preservation of the academic integrity of individual programs and institutions. The supporting guidelines included: clear articulation concerning the determination of course equivalencies and an elaboration that equivalency can be demonstrated and measured in a number of ways; an underscoring of emphasis on the need for students to be provided with sufficient and appropriate information prior to beginning their programs; and a stronger assertion that receiving institutions may limit their admissions based on course availability and the ability of transfer students to meet the course

criteria. Although these principles and guidelines in general support the purpose of facilitating student mobility, this latter shift in emphasis indicates that perhaps the concern expressed in the 1987 report regarding the possibility that direct-entry university students might enjoy an advantage over college transfer students was not ill-founded.

In an effort to improve communication and provide students with the necessary information regarding their transfer options, another undertaking adopted by BCCAT was the publication of a yearly *Transfer Guide* laying out course and transfer credit equivalencies among all of the institutions in the post-secondary system within the province. The *Transfer Guide* replaced the publication of several separate and unrelated guidelines by the three major universities. This document has become the primary vehicle for imparting information about the transferability of credits between institutions to students and post-secondary personnel. By 1998/99, almost 2,500 copies of the 9th annual *Transfer Guide* were distributed to public and private post-secondary institutions, agencies, and organizations. Also, since 1996 the *Transfer Guide* has been available online, providing up-to-date information in a user-friendly format (BCCAT, 1998).

The transformation of four existing community colleges into university colleges in 1989 was another major outcome of the recommendations of the *Access for All* report. Initially, the university colleges offered degrees in conjunction with one of the universities in British Columbia. Today, the five university colleges (Kwantlen College became Kwantlen University College in 1995) offer programs ranging from adult basic education to four year degrees (Petch, 1998).

Since the 1988 *Access for All* report, the post-secondary system has expanded to include seven public universities (including the Open University), one private university, five university colleges, twelve community colleges (including the Open College), five public institutes, as well as hundreds of private colleges and trade schools. Hence, today's post-secondary students are confronted with a post-secondary system that is extensive, highly diversified and – in terms of interinstitutional articulation – complex. For example, of the 14 degree granting institutions, at least five – the university colleges – serve as both sending and receiving institutions. Hence, transfer to and from the university colleges has added another level of complication in previously established transfer arrangements between the colleges and universities. However, for some students, university colleges have eliminated the need to transfer to another institution. Such changes in the structure and dynamics of the post-secondary system, in conjunction with recent policy directives such as

those specified in *Charting a New Course: a Strategic Plan for the Future of British Columbia's College, Institute and Agency System* (1996), has helped to shape the role of the B.C. Council on Admissions and Transfer.

Today, the primary purpose of the Council is to initiate and facilitate activities, practices, and policies that lead toward the development of a shared vision of the interinstitutional transfer of credits by students. With the goal of promoting and maintaining an efficient and effective transfer system, the key functions of the Council can be organized around five themes: 1) the maintenance of paper and web based versions of the B.C. Transfer Guide; 2) provision of support for and coordination of the Provincial Articulation Committees; 3) collaboration with the Ministry of Advanced Education, Training and Technology, the Ministry of Education, post-secondary institutions and other agencies; 4) in-house research and policy initiatives; and 5) support of other research efforts which contribute to the assessment and improvement of transfer practices in the province.

Support and coordination of the Provincial Articulation Committees is described as "one of the principal activities of the BCCAT" (BCCAT, 1998). Recent initiatives include a collaborative effort with the Centre for Curriculum, Transfer, and Technology to add secondary school representatives to 50 articulation committees, and the production of the second edition of the *Articulation Committee Handbook*.

The Council collaborates regularly with the two Ministries and several agencies including the Centre for Curriculum, Transfer, and Technology (C2T2), the Center for Education Information Standards and Services (CEISS), the Outcomes Working Group (OWG), Centre for Applied Academics (CFAA), the University Presidents Council (TUPC), and the Advanced Education Council of B.C. (AECBC). Also, ongoing dialogue is maintained with administrators and representatives of various post-secondary institutions and other provincial, out of province, and national agencies. Examples of collaborative efforts with C2T2 include active involvement by the Council on the Provincial Steering Committee on Flexible Assessment (PLA), the Working Committee on Public-Private Articulation Agreements, and the Enhancing Transitions writing team. Collaborative projects with CEISS resulted in two publications based on analyses of 1995, 1996 and 1997 Student Outcomes Survey data and a joint effort between the Council and the Center for Applied Academics led to the production of a short document clarifying direct entry requirements

for high school students enrolled in applied academic courses.

In response to the statement in the *Charting a New Course* document by the Ministry of Education, Skills and Training (1996) that "block transfer agreements will be developed to allow transfer of credits between institutions, and eliminate the time consuming process of course-by-course institutional credit assessment" (p.37-38), in 1997 the Council embraced the issue of block transfer as a topic for system-wide discussion (Finlay, 1997a; 1998). Following a consultative exercise including responses to a discussion paper, several presentations and seminars, and a forum attended by over 100 representatives from the post-secondary system and related agencies, two motions "support[ing] and encourag[ing] the development and promotion of block transfer" and mandating articulation committees "where appropriate to undertake discussion and actions to achieve these principles and actions" (BCCAT, 1998, p.1) were passed by the Council in December 1997.

Another recent policy initiative of the Council was the establishment in 1996 of the Task Force on Standards and Processes "to identify impediments to smooth and efficient transfer which may result from processes in use in our institutions, and to make recommendations through the Council to the institutions for improvements to these processes" (Report of the Task Force on Standards and Processes , 1997, p.21). The report of this committee identified several key issues related to resources within post-secondary admissions and registration offices.

Also, a key role of the Council is to support other research efforts[2] (of which this is one) which contribute to the assessment and improvement of transfer practices in the province. One such project supported and published by the Council is an analysis of the College and Institute Student Outcomes Survey data as a means of gaining insight into transfer processes and potential problem areas. The first study (Gaylord, Ducharme & Associates, 1996) used 1995 Student Outcomes data to profile the kinds of transfer credit problems experienced, the kinds of students experiencing problems, and the kinds of institutions associated with the problems reported. Based on the recommendations of the 1995 study, the Student Outcomes Survey instrument was expanded to include several additional questions on transfer. A second analysis focused primarily on the transfer of credit by former Arts and Science (*i.e.*, "academic") and Applied (*i.e.*, "non-academic") students who responded to the 1997 Student Outcomes Survey (Gaylord, Ducharme & Associates, 1998).

[2] Summaries of these reports are provided in the annotated bibliography appended to this document.

In 1996, the Council commissioned Lesley Andres to conduct in depth studies of students' transfer experiences. This project, entitled *Investigating Transfer*, involved three phases. In *Phase I*, students who transferred from Douglas College to Simon Fraser University were interviewed to determine the nature of transfer, and difficulties and successes encountered before, during, and after transfer (Andres, Qayyum, & Dawson, 1997). In *Phase II*, students enrolled in Douglas College in 1997 were followed over time to determine students' transfer intentions, steps taken to transfer, and experiences related to the transfer process (Andres, 1998). *Phase III* involved an analysis of the history of provincial and institutional transfer policy. Together, the results of the *Investigating Transfer Project* provide a more detailed description and analysis of students' experience of the transfer process, and contribute towards ongoing revisions of transfer practices that might ameliorate some of the reported problems. Recommendations from this study, together with similar recommendations by the *Task Force on Standards and Processes*, have resulted in the establishment of a committee to develop a transfer handbook for students.

The Council also supports studies conducted by post-secondary institutional research offices. Examples include a report entitled *Transfer Credit Assessment for B.C. College Transfer Students Admitted to the University of British Columbia in the 1997/98 Session* (Reh-Bosch & Atkins, 1998) which documents the transfer credit process of a random sample (n=338) of University of British Columbia students and a document by Heslop (1998) which provides a profile of B.C. college transfer students and "non-B.C. college transfers" admitted to Simon Fraser University between 1992/93 and 1996/97.

Summary

This paper has reviewed the growth of the higher education system in British Columbia since the early 1960s, and in tracing the trajectory of educational expansion, consolidation and revision, has demonstrated how transfer policies and practices have evolved. Clearly, the nature of the recommendations set forth in the Macdonald Report were so instrumental in shaping the higher education system that they have had significant implications for transfer effectiveness and for the kinds of transfer-related problems with which students and institutions have had to deal. In

particular, Macdonald's recommendation that universities and colleges function as autonomously as possible has meant that the need for significant and ongoing effort in ensuring co-ordination and articulation among the many institutions within the system has been considerable. To a great extent the effort has been successful, and a high degree of integration has been attained, especially considering the key role that diversity and self-government have played within the system.

However, a number of persistent problems remain. In 1972, Jeffels documented the following problems related to transfer:

> Admission requirements differ; grading practices are not the same; policies on "good standing" vary; the academic year changes according to the institution; so do deadlines for applications and registration. University calendars are not always Cartesian in their precision of ideas and clarity of expression. Confusion is bred because they are often misunderstood and misinterpreted. (p.8)

Numerous 1990s Council sponsored research efforts echo these findings. Many of these problems – ranging from a common understanding of what constitutes a "transfer problem" to the specific transferability of courses among institutions – continue to affect students as they attempt to progress through the system to complete their post-secondary studies. Approaches to date, as reflected in Council newsletters and special reports, indicate that many committees associated with the issue of transfer, and existing policies and practices, have focussed on honing and refining – rather than completely overhauling and rebuilding – the system.

As the B.C post-secondary system continues to expand and evolve, and as pressures for increased efficiency and accountability by students and other parties escalate, ongoing collaboration among the Council, the colleges, institutes and agencies, universities, the private post-secondary system, and the ministries responsible for education and advanced education will be essential to ensure the continued development and refinement of effective policies and practices related to access and transfer. However, refinement alone may not be sufficient. As institutions grow and develop laterally and horizontally, it may be necessary to embrace new ways of thinking to facilitate seamless movement through the system by students. If indeed the goal is to develop a shared vision of credit transfer among the many and diverse post-secondary institutions in British Columbia, issues such as the resolution of perceived power imbalances among types of institutions, replacement of a course-by-course process by one or more models of "block" transfer, and acknowledgement of the frustrations that students experience beyond the mechanics of credit

transfer in making their way through the system, will need to be addressed. Can a shared vision be reached through ongoing dialogue and collaboration, or as raised by Finlay (1997a) and enacted in other jurisdictions (State Higher Education Executive Officers and the National Centre for Educational Statistics Communications Network., 1998), might it take an act of legislation to enact such changes?

Dennison, J., & Jones, G. (1968). ***A Study of the Characteristics and Subsequent Performance of Vancouver City College Students who Transferred to the University of British Columbia in September, 1967.***

This report begins by making reference to a prior report by Dennison and Jones (1968) documenting the characteristics and performance of 146 Vancouver City College students who transferred to the University of British Columbia in September, 1966. These students were the first group of transfer students since VCC opened. Based on SCAT scores, the authors concluded that "the quality of transfer students is not greatly different from the regular student."

In the 1967 study, 376 students transferred to UBC in September 1967. The report is comprised primarily of tables profiling transfer students according to program, age, sex, and GPA. The following conclusions were drawn: 1) GPA at VCC proved a fairly good indicator of future performance; 2) approximately 40% of transfer students successfully completed their year at UBC; 3) performance in courses was "not as successful" as regular UBC students, but the percentage passing the course was comparable; 4) the higher the GPA at VCC the greater the probability of a higher UBC average; 5) prognosis of success varied considerably between faculties; 6) a greater than 40% completion rate indicated the value of college (up from 34% previous year); 7) the proportion who failed remained at 15% was "encouraging"; and 8) more research in future years is needed.

Dennison, J., & Jones, G. (1970a). ***A Long Range Study of the Subsequent Performance and Degree Attainment of Students who Transferred from Vancouver City College to the University of British Columbia from 1966-1969.*** **Published by the Division of Research and Institutional Development, Vancouver City College, January, 1970.**

Building on previous reports, this study provides an analysis of the subsequent achievement of college transfer students two and three years after transfer, and offers an account of the success of transfer students in terms of degree attainments (p.2). The incentive for the study was the finding that a rather low percentage of transfer students was achieving baccalaureate requirements "on time." The study examines subsequent achievement after transfer, change in status, degree attainment, and comparative characteristics.

Findings indicated that although achievement over a two and three year period was not impressive and the attrition rate appeared high there were two factors to consider – smallness and newness of transfer group, and the "second chance" character of students. Twenty-one percent graduated "on time"; withdrawal accounted for one third of non-graduating students; others were enrolled part-time or changed their course of study.

The authors concluded that there is "a growing body of evidence to support a view of transfer after two full years of study at a community college as being more satisfactory, academically speaking, than transfer after one year at college" (p.42). In other words, students should be urged to complete two years at college before transferring. "It is entirely possible that a

detailed analysis of the records would in a number of instances reveal specific transfer problems which could be remedied quite easily, thus enabling an even larger number of transfer students to graduate on time as well as avoiding a rather high attrition rate" (p.44).

The report indicates that the attrition rate in university varied according to faculty entered and recommended better matching of students and faculties (*i.e.*, encouraging students into a faculty where they have a better opportunity of success). Finally, the authors claim that a high degree of articulation will be required as the number of transfer students increases and diversity of programs grows.

Dennison, J., & Jones, G. (1970b). ***The Community College Transfer Student at the University of British Columbia: A Three-year Study.*** **Published by Vancouver City College, March 1970.**

Since their inception (1965) there has been concern about community colleges as "havens for second class students whose academic achievements were insufficient to allow them entrance to the universities" (p.1). This report offers an evaluation of academic performance of university students who transfer from VCC. It presents a profile of transfer students according to: faculty entered; sex; year level entered; age grouping; VCC cumulative GPA; university status; relationship between college GPA and university academic average; mature versus college age student; high school achievement; transfer credit; and course achievement. The following transfer problems were identified: 1) loss of credit as a result of students taking more college courses than the transferring university faculty would allow; 2) "wrong" courses taken at college; 3) too many courses taken in a particular field; 4) "incorrect" course sequences; 5) transferring with more than the allowable maximum units (p.62). However, loss of credit was not experienced by the majority. When comparing transfer students with regular UBC students, "on time" degree graduation was four times as likely for "regular" university students.

The report concluded that 1) information was available in university and college publications, but "counselling needs to be greatly expanded at all levels," and 2) "what is probably required is transfer by **program** not by **course** as is in most cases the situation now. Program transfer would preserve the individual college's right to experiment and innovate and at the same time protect the student's transfer credit" (p.64).

Dennison, J., & Jones, G. (1971). ***Research Review: A Summary of Completed Research Programs, Current Research Programs, and Proposed Research Studies.*** **A report to the Vancouver City College Council, February, 1971.**

This is a compilation of publications about college transfer and career students (including all of those mentioned above).

B.C. Research (1972). ***Performance of College Transfer Students at UBC 1971-1972.***

This document contains tables only.

Dennison, J., Jones, G., & Tunner, A. (1974). ***The Impact of Community Colleges Report #11. British Columbia Colleges Articulation Study: University Achievement.*** **B.C. Research, January, 1974.**

The two main objectives of the study were to: 1) provide data on the academic achievement of community college transfer students *after* transfer to university; and 2) to develop computerized procedures for gathering and analyzing certain data essential for studying academic progress by students in post-secondary institutions. The report is a presentation of data tables.

Dennison, J., Forrester, G., Jones, G., & Tunner, A. (1974). ***The Impact of Community Colleges Report #12. British Columbia Colleges Articulation Study: On the Performance of Vancouver Community College Transfer Students at the University of British Columbia.*** **B.C. Research, November, 1974.**

Comprised mostly of tables, this report concludes that the successful transfer student would: 1) have originally met all university entrance eligibility requirements; 2) have a cumulative GPA of at least 2.5; 3) be a mature student in a social science faculty or a college-age student in a science faculty; 4) transfer after having received at least one full year of credit; and 5) have earned a 63%+ average at high school.

Jones, G. (1975). ***Articulation 75 - UBC Transfer Students: Vancouver Community College.*** **Vancouver Community College Office of Institutional Planning and Development, December, 1975.**

This report consists of a series of tables of academic standing by faculty.

Jones, G., & Dennison, J. (1977a). ***Report #20. A Study of Achievement in History Courses by College Transfer Students: A Vancouver Community College - University of British Columbia Articulation Report.*** **B.C. Research, March, 1977.**

The purpose of this report is to compare "pre-college, college and university achievement by transfer students in history courses alone" (p.1). The performance in university history courses of 57 students (45 from high school, 12 mature) from VCC who had enrolled in one or more history courses in their first year of transfer is monitored.

This report concluded that although "mature" and part-time students transferring from college were less likely than "college-age" and full-time students to achieve first class grades, they were less likely to fail or drop out of history courses. College age students who were ineligible for

direct entry to university were more likely to have lower achievement levels, but achievement of transfer students who were eligible for direct entry was comparable to direct entry students. Whether students had taken history courses did not appear to affect university performance in history courses.

Jones, G., & Dennison, J. (1977b). ***Report #21. A Study of Achievement in Political Science Courses by College Transfer Students: A Vancouver Community College - University of British Columbia Articulation Report.*** **B.C. Research, April, 1977.**

This report documents the success in political science courses of 61 VCC transfer students who entered UBC in the fall of 1975. Results of this study indicate that completion of political science courses in college and whether a student was mature rather than college-age did not affect achievement in political science courses at UBC. Transfer students who were ineligible for direct entry to university were more likely to achieve poor academic grades. Part-time students were also less successful in political science courses; however, they were also less likely than full-time students to withdraw or fail.

Jones, G., & Dennison, J. (1977c). ***Report #22. A Study of Achievement in University English Courses by College Transfer Students: A Vancouver Community College - University of British Columbia Articulation Report.*** **B.C. Research, June, 1977.**

The results were somewhat different than in history and political science, where college transfer students performed better than direct entry students in English university courses.

Dennison, J. (1977). ***Report #26. British Columbia Colleges Articulation Study: University-Transfer Programs in the Community College, a 1977 Perspective.*** **B.C. Research, November, 1977.**

Despite the claim that "the dominant philosophy of the community college has shifted from its original academic orientation to its role as an essential component in the long-term economic plan for the future of the province" (p.2), results of this study reveal that two thirds of the students attending B.C. community colleges were enrolled in academic programs. Results also suggest that the further the college is located from the university the lower the transfer rate.

The report concludes that performance of college transfer students depends on any or all of the following: the colleges from which the students transfer; year of transfer; the university faculties and departments in which they enter; and sex and age of student. Some general comments are offered:

- transfer students earn fewer first class averages, and are more likely to withdraw;
- performance tends to improve after first year of transfer;
- up to one half were academically ineligible to enter university from secondary school;
- "borderline" transfer students with GPAs of 2.5 or lower account for most unsuccessful transfers.

Jones, G., Forrester, G. C., & Dennison, J. (1979). ***Report #32-A. A Comparable Study of College and University Students: After the Second Academic Year. A Summary.*** **B.C. Research, June, 1979.**

This is a study of two matched samples, one entering the academic transfer program at VCC, another entering UBC. Performance was monitored in the following areas: persistence with regard to full-time study; withdrawal from both complete programs and individual courses; academic standing and credits earned; relationships between secondary and post-secondary performance; and differences between males and females and among high schools. Findings indicate, among other things, that there are: 1) more full-time enrollments at UBC; 2) more movement from one institution to another than anticipated; and 3) superior achievement among female students at college.

Dennison, J., Jones, G., & Forrester, G. (1979). ***Report 33. British Columbia Colleges Articulation Study: University Achievement (UBC 1978-79 academic year).*** **B.C. Research, September, 1979.**

The purpose of this report was to: "1) provide data on the academic achievement of community college transfer students *after* transfer to a university; and 2) to continue development of computerized procedures for gathering and analyzing certain data essential for studying academic progress by students in post-secondary institutions" (p.1). The report consists of a compilation of 408 pages of tables summarizing the achievement of UBC transfer students by sending institution. An analysis of the tables is not provided in this report.

Forrester, G., Jones, G., & Dennison, J. (1980). ***Report #39. British Columbia Colleges Articulation Study: University Degree Completion of College Transfer Students (University of British Columbia 1973-1979).*** **Prepared for the Academic Council, Victoria, B.C., by B.C. Research, November 1980.**

Findings indicate that degree completion rates of transfer students varied among faculties (lower completion in commerce, nursing, applied science, and science). Withdrawal rates also differed from faculty to faculty (generally high, in the 20 to 40 percent range). The majority of college transfer graduates earned a second class standing (8% received first class standing). Graduation rates were somewhat higher for students who enter university at the third year level than for those entering at either the first or second year levels.

British Columbia Ministry of Advanced Education and Training (1987a). *Access, Completion and Transition to work: Transfer Policies and Mechanics.* Paper No. 7, November 10, 1987.

This paper is one of 11 papers in the series "Access, Completion and Transition to Work." The purpose of these papers was to provide background for discussion. Data presented in these documents were from Ministry, British Columbia Research and Statistics Canada publications.

This document compares the development of the post-secondary systems in B.C. and Alberta. Community colleges in each province "were viewed initially primarily as vehicles for responding to local pressure to make university education more accessible to the hinterland" (p.1). According to this report, three factors contributed to the development of the community college system: 1) increased proportion of the population in each province completing high school; 2) growth of towns and smaller cities; 3) the "junior" college being described in the U.S. as "the great social equalizer." However, institutional arrangements in the two provinces developed differently. Compared with Alberta, early community colleges in B.C. were relatively independent of the universities and objected to scrutinization by the universities.

This document describes the transfer system in B.C. as generally effective. However, open-ended discussions with faculty and staff from ten colleges and institutes pointed out several observations about the current system:

- much of the transfer process proceeds without problem;
- students may be "led by college staff to have unrealistic expectations," that is they will have open transfer choice with no loss of credit;
- a number of "minor irritants" associated with the transfer process at UBC are being attended to by a committee;
- considerable follow-up of college to university transfer in B.C. is conducted, but not for those transferring outside the province.

It was pointed out that to ensure its success, communication among institutions and their students required ongoing attention. The notion of "block transfer" is mentioned. Block transfer is described as an arrangement of "two-year college programs common to colleges and further two-year university programs common to all universities, and students should move somewhat automatically from one to the other" (p.4).

Three issues were raised for further consideration: the need to develop transfer arrangements for students from career programs; more attention to the affairs of international students; and a need to address the perception that students who do not begin their studies at university do not have equal opportunities for admission later with those who entered university directly.

British Columbia Ministry of Advanced Education and Training (1987b). *Access, Completion and Transition to Work: Completion, Transfer and Retention.* Paper No. 8, November 10, 1987.

This document is another in the series of 11 papers on "Access, Completion and Transition to Work." In this paper, several questions about terms such as "completion," "transfer," and

"retention" are raised. For example, transfer itself is described as not a measure of completion but is a "milestone for those who begin academic programs at colleges with the intention of transferring to university" (p.2). It is suggested that reporting on completion is difficult because "there is little agreement on what constitutes completion" (p.1).

Most of this report is comprised of data comparing retention and completion rates among the different post-secondary institutes in the province. One of the most striking assertions in this report is that "on average, less than one in four full-time students who begin college academic programs can expect to end up with a first degree. Looking at it another way, those who begin studies at university have twice the chance of completion as those who begin at college" (p.11).

Report of the Provincial Access Committee (1988). ***Access to Advanced Education and Job Training in British Columbia.*** **Report of the Provincial Access Committee, Submitted to The Hon. Stanley B. Hagen, Minister of Advanced Education and Job Training, Victoria, B.C., September 1988.**

"Admissions, Transfer, and Articulation" is included as one of five priority concerns in the report, along with institutional capacity and program quality; literacy and adult basic education; university degree programs outside the lower mainland and south Vancouver island; and under-represented groups.

This report emphasizes co-operation between autonomous post-secondary institutions. The work of articulation committees regarding transfer of course credit is supported. In addition, this report recommends that "a Co-ordinating Council on Admissions, Transfer and Articulation with representatives chosen from names submitted from within the system, be established to provide a mechanism for the resolution of difficulties which may arise from time to time with respect to admissions, course and program equivalency, degree requirements, and transfer of course credits" (p.22).

Gaylord, Ducharme and Associates (1996). ***Student Transfer Issues Revealed in British Columbia's Post-Secondary Education Student Outcomes Surveys: An Analysis Intended to Enhance the Survey's Future Utility.*** **Report prepared for the B.C. Council on Admissions and Transfer, November, 1996.**

This report documents the results of a survey concerning the incidence of students requesting "transfer of credits" and the problems associated with it. Data were aggregated into nine "transfer problem categories." It was also possible to infer whether transfer problems originated at either the "sending" or "receiving" institution.

Students and/or institutions experiencing transfer problems can be summarized as follows:

- 16 percent of respondents report having problems;
- students between 21 and 23 had the highest report incidence of problems (18.6% compared with around 15%).

- students from rural colleges have the highest problem rate (18.6%) followed by university college students (17.6%) followed by urban colleges (13.9%).
- Northern Lights College have the highest incidence of problems (25.5%) and Capilano College had the lowest (12.1%).
- problem rates decline with reported level of satisfaction with program at sending institution
- the "preparing to transfer" students have the lowest likelihood of experiencing problems
- the highest incidence of problems str associated with those who were leaving the sending institution because they were dissatisfied or disappointed
- in general, problem rates decrease as feelings of preparedness increase
- receiving institutions where the highest incidence of problems were reported are out of province universities (30.8%) followed by B.C. universities (15.7%).
- SFU and UBC have the lowest complaint rate (14.2% and 14.0% respectively) and U.Vic has the highest (20.3%). UNBC had an incidence rate of 18.8%.
- the higher the total credits, the greater the incidence of reported problems
- observed problem rates slightly decrease as GPA increases (17.9% to 14.2%).

Transfer problem themes included difficulty in obtaining transcripts (5%) and inability to transfer credits (55%). Less frequently reported problems included the following:

- one or more courses not accepted
- specified course not accepted
- too many credits to transfer
- quality of transfer information
- problems due to change in rules
- articulation problems
- bureaucratic problems
- delay in getting credit
- unsatisfactory articulation rules
- student's own fault
- general transcript problems

This report concludes that students encounter numerous problems, including the limited availability of information when trying to transfer from a B.C. college or institute to another institution.

Finlay, F. (1997a). *Block Transfer: Issues and Options.* Discussion Paper. Vancouver: BCCAT.

In response to the statement in the document by the Ministry of Education, Skills and Training (1995) entitled *Charting a New Course: a Strategic Plan for the Future of British*

Columbia's College, Institute and Agency System that "block transfer agreements will be developed to allow transfer of credits between institutions, and eliminate the time consuming process of course-by-course institutional credit assessment" (p.37-38), this discussion paper broaches the topic of the feasibility of implementing a system of block transfer for Arts and Sciences degrees in British Columbia. In the first part of this document, the author outlines limitations to the current system of granting transfer credits in B.C., then presents a summary of arguments advanced by proponents of block transfer. Following a review of current block transfer arrangements in business and professional programs throughout the province (of which 155 were listed in the 1996-97 *B.C. Transfer Guide*), the author presents the following questions in relation to block transfer arrangements for academic degrees, as posed by the Provincial Strategic Planning Committee: "can [block transfer] enhance and ease transfer processes and reduce student frustration" and "will [block transfer] eliminate the need for course-by-course assessment of credit"?

In the second part of this document, six models of block transfer are described. The table summarizing these models is reproduced below. The discussion paper concludes by asking whether, in the instance where voluntary agreement by participating institutions fails, the issue of block transfer should be mandated by legislation.

BLOCK TRANSFER MODELS	
MODEL	***DESCRIPTORS***
1. System Wide Transfer	All university-level courses delivered by any public post-secondary institution would automatically transfer to all post-secondary institutions.
2. GECC	A required collection of courses designated to provide the exposure to (General Education Core Curriculum) humanities, social sciences and science perspectives considered essential to many degrees.
3. Standardized Pre-Major Program	Curriculum for the 1st and 2nd year prerequisites for the major is standardized for each discipline across all post-secondary institutions. (All institutions teach the same courses).
4. Flexible Pre-Major Program	Currriculum for the 1st and 2nd year prerequisites for the major is chosen from a flexible set of courses, based on collaboratively established criteria. (All institutions may teach some of the same courses.)
5. Learning Outcomes	Transfer credit based on outcomes achieved, not on curriculum covered or courses taken. ***or*** Curriculum for "block" established collaboratively based on desired knowledge, skills and abilities (outcomes) the students must achieve.
6. Descriptive Pathways	Curriculum committees (or other groups) collaborate to agree on a "grid" which lists courses currently being taught at sending institutions which students can take to transfer to all receiving institutions in the province.

Report of the Task Force on Standards and Processes: Final Report. **(1997). Vancouver: BCCAT.**

This document is the final report of the *Task Force on Standards and Processes.* This Task Force was constituted in 1995 with the mandate "1) to identify impediments to smooth and efficient transfer which may result from processes in use in our institutions, and 2) to make recommendations through the Council to the institutions for improvements to these processes." (p.21). The guiding principle behind this document was that "students should not be disadvantaged as a result of the administrative processes in place at their institutions to which they wish to transfer" (p.2).

Based on a review of the literature on issues related to transfer and the results of a survey completed by 98 B.C. post-secondary student advisors/counsellors, admissions, and registration personnel, the following five central issues related to resources within post-secondary admissions and registration offices were identified: 1) timing issues for transfer students; 2) tracking issues; 3) record keeping issues; 4) information/communication issues; and 5) other issues. Twenty-eight recommendations were offered to assist admissions and registration personnel in addressing resource issues in their respective offices.

Andres, L., Qayyum, A., & Dawson, J. (1997). ***Investigating Transfer Project Phase I. Transfer Experiences of Students from Community College to University.*** **Research report prepared for the B.C. Council on Admissions and Transfer.**

The purpose of this study was to interview SFU students who had transferred from Douglas College to determine the nature of transfer; portray experiences surrounding the transfer process; document difficulties and successes encountered before, during, and after transfer; highlight advantages and disadvantages of transfer; and offer recommendations for improving the transfer process. In total, 47 individuals were interviewed.

Results of this study indicated that although the mechanics of the transfer process did not present an overwhelming source of distress for transferees, there were several sources of concern. Problems included miscommunication between Douglas College and SFU, difficulties experienced by students in trying to make sense of the information, lack of familiarity with the required procedures, and misunderstanding of transfer practices such as the designation of "unassigned credits" and differences between general acceptance vs. acceptance into a program. Of all the issues associated with transfer, the decline in GPA after transfer was the most significant and the one that consistently caused students the most anxiety. Other findings included students' descriptions of the difference between college and university, and the advantages and disadvantages of transfer.

The following recommendations were offered: development of a user friendly *Transfer Handbook for Students*; the provision of a written explanation for each course that was not fully transferable to transfer students; a review of how information about the transfer process is imparted to students; conversion of the coding scheme in this report into a survey questionnaire to be administered to first year transfer students; the need to address the problem of declining grades after transfer.

Centre for Curriculum, Transfer, & Technology. (1997). ***Enhancing Transitions: A Guide to Creating Formal Agreements between School Districts and Colleges, University Colleges, Institutes and Agencies.*** **Victoria: Ministry of Education, Skills, & Training.**

This handbook has been developed to "help guide the process of developing articulation agreements between secondary schools and districts on the one hand and colleges, university colleges, institutes and agencies on the other. It is designed primarily to assist faculty, teachers, and educational administrators in understanding the principles of articulation and in constructing effective articulation agreements" (p.9). This document begins by specifying the assumptions and principles of articulation agreements. Next, the objectives, benefits, process and provisions of system-to-system, institution-to-institution, and program-to-program agreements are described. The 36 pages of appendices contain templates and samples of each type of agreement.

Finlay, F. (1997b). ***The Block Transfer Project. Consultation and Response.*** **Vancouver: BCCAT.**

In this document, the author summarizes the results of responses of several constituencies to the document *Block Transfer: Issues and Options*. Responses took the form of discussions during 12 seminars and presentations, 48 written submissions, and small and large group discussions in an all day forum. The analysis presented in this document is based primarily on written submissions and the discussions at the all day forum.

The analyses capture a broad array of opinion about block transfer. There appeared to be considerable support for exploring options such as block transfer to supplement rather than replace current transfer arrangements. Also, responses stressed the need for maintenance and enhancement of flexibility and improvement of a diversified, autonomous system. The voluntary nature of this endeavour was emphasized.

According to the responses received, all six models presented in the Block Transfer: Issues and Options document have strengths and limitations. However, three models Model 6 – Descriptive Pathways, Model 4 – Flexible Pre-Major and Model 5 – Learning Outcomes, appear to present the most promise in improving the system according to the principles outlined above.

Report of the Working Committee on Public-Private Articulation Agreements. **(1997). Victoria: Centre for Curriculum, Transfer & Technology and the Ministry of Skills, Training & Labour.**

The mandate of this committee was to "provide guidance and direction in the development of articulation agreements between private post-secondary institutions and the college, institute, and agency system" (p.3) and "to recommend a policy framework and criteria to guide and encourage recognition between public and private providers" (p.5). Guided by this mandate, the *Working Committee on Public-Private Articulation Agreements* developed the

following: a draft policy statement; a set of criteria specifying the conditions upon which to base public-private articulation agreements; principles and guidelines for articulation of programs and guidelines; a checklist to facilitate the articulation negotiation process; and the identification of several critical issues that fall outside the mandate of the committee but, nevertheless, must be considered when discussing the topic of public-private articulation.

The Working Committee recommended that the Ministry of Skills, Training and Labour adopt a policy statement which supports and encourages the development of articulation agreements between Private Post-Secondary Education Commission (PPSEC) accredited private post-secondary institutions and public post-secondary colleges, institutes and agencies. This policy statement also outlines the principles, conditions, and criteria for such articulation agreements.

The Working Committee also recommended eight criteria for credential recognition, including: institutional autonomy; accreditation; quality; course, program, and institutional fit; faculty involvement; educational approval; centralized and accessible records; and review. In addition, 17 principles and guidelines for the negotiation of articulation agreements and a detailed checklist to facilitate their development were offered. Finally, several issues which fell outside the mandate of this committee were highlighted. These issues include: dealing with exceptional cases; four articulation strategies to improve the effectiveness of student movement through the system; how to manage the costs of articulation; a discussion of system-wide coordination; evaluation of the process; and specific political and philosophical issues surrounding such an articulation process.

Finlay, F. (1998). ***The Block Transfer Project: Update.*** **Special Report, February 1998. Vancouver: B.C. Council on Admissions and Transfer.**

This document describes the concept of block transfer and the provides a succinct summary of the consultation process around this issue, as led by the B.C. Council on Admissions and Transfer. Also, it documents two motions passed by the Council on December 12, 1997. The two motions were (in abbreviated form):

> **Motion 1.** The B.C. Council on Admissions and Transfer . . . . supports and encourages the development and promotion of block transfer arrangements for arts and science programs and courses. (Seven principles and five initiatives are associated with this motion).
>
> **Motion 2.** That articulation committees be informed of this motion and be mandated where appropriate to undertake discussion and actions to achieve these principles and initiatives. (p.1)

B.C. Council on Admissions and Transfer. (1998). ***Articulation Committee Handbook. A Guide to the Mandate and Operations of Post-secondary Articulation Committees in British Columbia.*** **Vancouver: B.C. Council on Admissions and Transfer.**

This handbook provides an orientation for new or existing chairs, liaison administrators, or members of provincial articulation committees. Part A of this document specifies the terms of

reference for the Program and Articulation Committee. Part B addresses the role and function of articulation committees, including: 1) objectives of articulation; terms of reference for and goals of articulation committees; 2) terms of reference for, and roles and responsibilities of the committee chair; 3) roles and responsibilities of individual committee members; and 4) role and responsibilities of BCCAT. Several questions and answers are provided to help clarify the role and function of articulation committees. In Part C, the principles and guidelines of transfer are provided.

Reh-Bosch, S., & Atkins, L. (1998). ***Transfer Credit Assessment for B.C. College Transfer Students Admitted to the University of British Columbia in the 1997/98 Session.*** **Report prepared for the B.C. Council on Admissions and Transfer.**

This report provides a detailed account of the transfer credit process of a 12% (n=338) random sample of University of British Columbia students. This sample was generated from B.C. College transfer applicants who were admitted into one of the following five UBC programs: Applied Science, Arts, Commerce, Human Kinetics, and Science.

Results indicate that overall, these college students were granted 84.9% of the credits earned at a B.C. college. The proportion of transfer credit granted varied by UBC program and by community college attended. For example, whereas students transferring into the UBC Science program earned an average of 78.8 credits, those transferring into UBC Human Kinetics earned an average of 91.1 credits. Further analyses portray total credits not granted at UBC as a percentage of total credits earned at the sending community college, total credits earned in relation to total credits attempted at the sending community college, unassigned credit granted as a percentage of total credit granted at UBC, and reasons for not granting transfer credit. A list of courses not granted credit because they are not articulated at UBC is provided in the appendices of this document.

Overall, community college students earned 95% of the credit they attempted while attending the sending institution. In other words, transfer credit was not denied because of failing grades. To explain denial of transfer credit on the part of UBC, the following reasons were provided:

1. College course was not articulated at UBC;
2. College credits were weighted less at UBC (e.g., 5 credit college course equals 3 credits at UBC);
3. Student exceeded maximum number of transfer credits permitted for a specific program at UBC;
4. Student exceeded maximum number of transfer credits in a specific subject area;
5. Equivalent or duplicate courses were completed at the college and credit was granted for only one of those courses at UBC;
6. High school level (or equivalent) course was completed;
7. No credit was granted if college course was taken on its own; and
8. College course was not given credit in specific UBC program. (p.1)

Suggestions for the improvement of policy and practice in relation to transfer credit are not offered in this report.

Heslop, J. (1998). ***Profile of B.C. College Transfer Students Admitted to Simon Fraser University 1992/93 to 1996/97.*** **Report Prepared for the B.C. Council on Admissions and Transfer.**

This document, consisting mainly of tables, provides a profile of B.C. college transfer students admitted to Simon Fraser University between 1992/93 and 1996/97. Key findings include the following:

- 86% of students transferred to SFU from lower mainland colleges, with the remaining 14% transferring from non-lower mainland institutions;
- almost one quarter of transfer students transferred the maximum of 60 credits to SFU, and 58% transferred more than 44 credits;
- only 32% of college student transfers attended full-time in their first semester at SFU, compared with 75% of B.C. Grade 12 Direct Entry students;
- 55% of transfer students, compared with 38% of B.C. Grade 12 Direct Entry students selected Arts as their degree goal. The figures for Science were 8% and 22% respectively;
- 58% of college transfer students were female, compared with 53% of B.C. Grade 12 Direct Entry students;
- the average admission GPA of college transfer students was 2.99. By the end of the first semester, the average GPA for this group dropped to 2.50, then recovered to 2.91 by graduation. Students admitted directly to SFU from high school experienced a drop in GPA from 3.35 at entry to 2.48 after the first semester;
- 55% of college transfer students graduated from SFU within a four year period. There appeared to be a direct positive relationship between the number of credits transferred and university completion;
- using the last 60 credit hours as a benchmark, college transfer students' GPAs were somewhat lower (2.89) than those of direct entry students (3.15).

In addition, a profile of the 1264 students admitted to SFU with some transfer credit from a B.C. College is provided. These students were admitted as "non-B.C. College Transfers." Below is a summary of their successes at SFU:

- 78% of these students had studied previously at lower mainland colleges;
- students were admitted as "B.C. Grade 12" (34%), mature students (18%), special entry students (15%), university transfer students (22%), and other (11%);
- the average GPA for non-B.C. College Transfer students was 3.07 (compared with an average of 2.99 for college transfer students;
- 61% of this group of students transferred less than one year of credits;
- 60% of non-B.C. College Transfers were female.

Gaylord, Ducharme & Associates (1998). ***An Assessment of British Columbia's Post-Secondary Education Transfer Issues: the Student Perspective.*** **Report prepared for the B.C. Council on Admissions and Transfer.**

This report contains analyses of data related to the transfer of credit by a sub-sample of respondents to the 1997 College and Institute Student Outcomes Survey. For the most part, the report documents responses to eight questions related to transfer by 3,460 former Arts and Science (*i.e.*, "academic") students and 3,229 former Applied (*i.e.*, "non-academic") students who were continuing their studies. These questions were:

1. Did you try to transfer credits from <sending institution> to <receiving institution>?
2. Did you have any problems transferring credits?
3. How many courses, if any, did you not receive credit for?
4. Did you encounter any of the following transfer problems [related to transferring credit]?
5. Overall, how serious would you say those transfer-related problems were?
6. Were your transfer problems caused, at least in part, by poor or insufficient advice by <sending institution>; slow or inadequate service by <sending institution>; poor or insufficient advice by <receiving institution; slow or inadequate service by <receiving institution>.

The following key findings to this question were reported:

Arts and Science Students:

- Of the 5,047 former Arts and Science students in this study, 3,924 attended further studies. Of this total, 3,460 attended a different institution and 464 remained at the same institution;
- Of the 3,460 former Arts and Science students who transferred to other institutions, 2,842 (82%) reported that they tried to transfer credits;
- Of the 2,842 students who tried to transfer credits, 444 (16%) reported difficulty in trying to transfer credit;
- The most frequently reported problems with transfer included courses that were not transferable, receiving unassigned credit, and having earned more credits than they were able to transfer.

Applied Students:

- In total, 13,279 former Applied students were surveyed in 1997. Of this total, 3,867 (29%) attended further studies (3,229 attended a different institution and 638 remained at the same institution);
- Of the 3,229 former Applied students who transferred to other institutions, 1,539 (48%) reported that they tried to transfer credits;
- Of the 1,539 students who tried to transfer credits, 280 (18%) indicated that they had experienced difficulties in trying to transfer credit;

- The most frequently reported problems with transfer of credit included courses that were not transferable, original courses or programs were not designed to be transferable, and the need to repeat courses that had already been completed successfully.

The report offers several recommendations for further research. Some of these recommendations include: asking a more specific question to identify the most problematic transfer problem; modifying questionnaire skip patterns to solicit responses from all those continuing their studies; refining the question referring to block transfer; linking survey data with institutional data; conducting longitudinal tracking; and carrying out focus groups with post-secondary personnel.

Andres, L. (1998). *Investigating Transfer Project. Phase II. Community College Students' Perceptions of Transfer*. Research report prepared for the B.C. Council on Admissions and Transfer.

In this report, results of *Phase II* of the Investigating Transfer research project are documented. The purpose of this study was to follow community college students over time to determine students' transfer intentions; steps taken to transfer; and experiences related to the transfer process. Initial telephone interviews of 19 first year Douglas College students were conducted in June and July of 1997 and a follow-up interview with the same group of students was carried out in November 1997. In addition, a focus group was conducted with another group (n=18) of Douglas College students.

A key finding of this study was that the notion "intent to transfer" is multifaceted. Although all students volunteered to participate in the interviews based on their intent to transfer, "intent" clearly meant many things. It involved the following:

a. Intent in the broadest sense of the word. Responses ranged from "maybe" to a definite "yes."

b. Choice of a receiving institution. Students' responses ranged from "I'm not sure" to the identification of a specific post-secondary institution.

c. Choice of program at the receiving institution. Responses ranged from "I don't know actually" to a specific program such as "boiler making" or "cardiology tech."

d. Intended date of transfer. Again students' responses were as vague as "within the next year or two" or as specific as "this September."

However, the higher the degree of certainty on each of these indicators of intent did not necessarily mean that the student had embarked on the transfer process in a highly systematic way.

Results also indicate that resources available to facilitate the transfer experience – including the calendar, the BCCAT Transfer Guide, counsellors and advisors – were underutilized by students. Students reported that they were unaware of the existence of some resources, unable to understand some of the written materials, or both. Advice provided by counsellors and advisors was described in many ways, including "great" "helpful" "confusing"

and "frustrating." Regardless of the opinions expressed, students preferred the assistance of a human being rather than being required to rely on written documentation.

Most students in this study appeared to employ a very unfocussed, unsystematic – and in a few cases, almost indifferent – approach to transfer. Students relied on word of mouth, primarily from other students and family members. The calendar was the most frequently used printed source of material. However, it contained information that was described as "confusing" and "frustrating." Despite complaints about the lack of resources and confusing advice, students did not appear particularly perplexed. There was a general sense that everything would work out in the end. Follow-up interviews in November 1997 revealed that over the four to five months since the initial interviews, most students remained unfocussed in their approach to transfer.

In *Phase I* of this project, a key finding was that of the "shock" of transfer. Students expressed astonishment at the difficulty of university level work, large classrooms, less accessible faculty, lowered grades, and increased competition. In Phase II, both interviewees and focus group participants appeared well aware of the challenging nature of university (and in some cases non-university) life. They expected that the receiving institution would be more challenging, good grades would be more difficult to achieve, and competition would be greater.

Recommendations for improvement of policies and practices related to transfer offered by students include the following: institutions should provide clear information that "the average student can understand"; accountability regarding advice provided by counsellors and advisors could be enhanced by a "paper trail"; and mandatory advising could help to clarify the transfer process for students. Other recommendations include consistency of course numbering across all B.C. post-secondary institutions, more stability in course requirements from year to year, and provision of information about transfer in high school. Finally, students recommended that they should be informed about the entire system, not simply articulation between one community college and one university.

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